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ABSTRACT

The Western Interstate Library Coordinating Organization (WILCO) received a grant from the United States Office of Education to develop and demonstrate a statistical data base system for library decision makers. The first quarter was devoted to obtaining background information, scheduling, organization, planning, and design. Achievements included (1) meetings to determine a framework of measures for the Program Classification Structure; (2) contact with the liaison person for the Major Research Universities Task Force; (3) compilation of a preliminary bibliography; and (4) selection of national advisory board members. The possibility of testing the system in Pennsylvania college libraries was investigated. The appendices include the preliminary bibliography, outlines of the task analysis and inventory, proposed schedule, revised Program Classification Structure, and budget. (Author/KP)

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FIRST QUARTERLY REPORT

Project No. 475AH60139
Grant No. 6007603529

DEVELOPMENT AND DEMONSTRATION OF A STATISTICAL DATA BASE SYSTEM FOR LIBRARY AND NETWORK PLANNING AND EVALUATION

BEST COPY AVAILABLE

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USOE QUARTERLY REPORT

For the Period
July 1, 1976 to October 31, 1976

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DEFINITIONS OF TERMS AND ACRONYMS

CASC--Council for Advancement of Small Colleges

DATA BASE SYSTEM--A structural means for collecting, organizing, retrieving, disseminating, and inter-relating those data elements identified as being critical for library planning and management.

DATA ELEMENT--For the purposes of this project a DATA ELEMENT will be defined as a generic term used to describe the components and subcomponents: Program Categories, Subcategories, Sectors, and Program Elements making up the NCHEMS Program Classification Structure.

HEGIS--Higher Education General Information Survey prepared by NCES.

IEP--INFORMATION EXCHANGE PROCEDURES--"The Information Exchange Procedures (IEP) developed by the National Center for Higher Education Management Systems (NCHEMS) are a set of standard definitions and procedures for collecting information about disciplines and student degree programs, outcomes of instructional programs, and general institutional characteristics. These definitions and procedures have been developed to facilitate exchange of information among insitutions of postsecondary education, providing institutions with some assurance that data they exchange are useful for purposes of comparisons." (NCHEMS, Technical Report 64, February 1975)

LIBGIS--Library General Information survey prepared by the National Center for Educational Statistics.

NCES--National Center for Education Statistics, Office of the Assistant Secretary for Education.

NCHEMS--National Center for Higher Education Management Systems at WICHE.

OUTCOME MEASURES--Indicate the outcomes or products generated as a result of the activities of the program element. (Topping, NCHEMS, Technical Report 35, February 1973)

OUTCOMES--Results and impacts.

PCS--PROGRAM CLASSIFICATION STRUCTURE--The following terms are utilized by NCHEMS to describe the Program Classification Structure:

Program	Program Subcategory	Program Measures
Subprogram	Program Sector	
Program Category	Program Element	

For complete definitions of these terms the reader is advised to consult the section of this report titled SIGNIFICANT FINDINGS AND EVENTS. APPENDIX B provides illustrations of the PCS framework.

USOE--United States Office of Education

WICHE--Western Interstate Commission for Higher Education.

WILCO--Western Interstate Library Coordinating Organization presently working on the Development and Demonstration of A Statistical Data Base System for Library and Network Planning and Evaluation.

I. INTRODUCTION

The Western Interstate Library Coordinating Organization (WILCO), under Grant No. G007603529 from the U. S. Office of Education, is working on the development and demonstration of a statistical data base system for library decision-makers with the support of the ten western states who are members of WILCO. WILCO is a unique forum for library leaders in the West which acts as a catalyst and coordinates multistate programs in: Continuing Education, Resource Sharing, Networking, and Library and Information Science Research. Building on the strengths of state based library systems and other organizations, WILCO promotes mutual understanding and focuses the energy, money, and talents of western librarians on cooperative and innovative activities for improving library services to all citizens in the western states.

II. THE PROBLEM

Library decision-makers are faced with the difficult task of trying to maintain or extend library services in the face of spiralling inflation and demands for new services. An array of alternatives in the use of input resources (financial, personnel, space, and materials) are available to decision-makers. However, the complexity of a library is such that all activities are interdependent. Any change in one input (such as financial) influences all other activities. The present statistics about libraries do not provide the necessary information--or structure for evaluating the necessary information--to make appropriate decisions on resource allocation, optimal productivity, or evaluation of the impact of changing library environments or alternatives in service. A different or improved statistical system is needed which will meet the needs of decision-makers.

III. GOALS

The goals and objectives--as stated in the original proposal--were couched in broad, general terms. The initial task of this project was the translation of these broad, general goals and objectives into specific goals and objectives attainable during the twelve month time frame. It was obvious that the task of developing a Statistical Data Base System with identification of Program Elements, standardized definitions and outcome measures would require more than one year. Reaching agreement on all terms, testing the completed system, and making it available for use by other states, groups of states, or national agencies would demand additional time beyond this proposal.

Realistically, this project can be viewed as requiring at least two phases. Phase I (this proposal) design and preliminary testing and Phase II the elaboration and testing of the design. This challenge does not detract from the all important first steps being underatken in this project.

The long-term goal of the project is the improvement of resource allocation decision-making by making available the information necessary to support a decision. The immediate goals of the current year are the identification, definition, compilation, and structuring of Program Elements and outcome measures which provide the information in the aforementioned long-term goal. The successful conclusion of the immediate goals will logically terminate in the development of a system for comparison of these elements with dynamic Program Measures resulting in invaluable assistance for library decision-makers.

IV. OBJECTIVES

The following objectives are milestones in the completion of the current project.

OBJECTIVE 1. To cooperatively design and develop a Statistical Data Base System employing the existing Libraries Subprogram of the NCHEMS Program Classification Structure. (APPENDIX B)

OBJECTIVE 2. To modify and supplement the Program Subcategories with Program Elements from other sources.

OBJECTIVE 3. To select two Program Categories to be analyzed through the Program Element level for subsequent testing.

OBJECTIVE 4. To clearly define, standardize, and compile outcome measures.

OBJECTIVE 5. To identify the statistical analyses which will permit comparison or combination of data elements resulting in workable outcomes for library decision-makers.

OBJECTIVE 6. To identify existing computer programs or develop new computer programs designed to accomplish Objective 5.

OBJECTIVE 7. To devise a plan of implementation and further study.

V. MAJOR ACTIVITIES AND ACCOMPLISHMENTS DURING THE PERIOD JULY 1, 1976 THROUGH OCTOBER 31, 1976

A. Advisory Board

Members of the national advisory board to the project were selected on the basis of their knowledge of and responsibility for library statistics. The following persons have been invited and have agreed to serve as advisors.

Mr. Frank Schick, National Center for Education Statistics, EJucation Division

Dr. Barbara Slanker, American Library Association, Office of Research

Mr. Robert Burns, Librarian for Research and Development, Colorado State University

Mr. Vernon Palmour, Consultant, Public Research Institute

Mr. Harold Olsen, Associate Librarians, Oberlin, Ohio

Mr. Dwane Webster, Association of Research Libraries

Mr. Ronald Dubberly, City Librarian, Seattle, Washington

Occasionally we hope to invite other outstanding members of the library profession to assist the advisory board in the review and evaluation of the project. Accordingly, Mr. William Williams, Wyoming State Librarian--a particularly active member of the statistics committees of state library organizations--has been invited to the first meeting of the advisory board. Additionally, Dr. Scott Bruntjen of the Shippensburg State College Library, Pennsylvania, has been invited to participate in the first meeting of the board.

The state librarians funding WILCO also serve as advisors on this project as part of their responsibility for WILCO. The current members are:

Richard Engen, Alaska
Marguerite Cooley, Arizona
Ethel Crockett, California
Anne Marie Falsone, Colorado
Helen Miller, Idaho
Alma Jacobs, Montana
Joseph Anderson, Nevada
Marcia Lowell, Oregon
Vince Anderson, South Dakota
Roderick Swartz, Washington

B. NCHEMS Meeting

A meeting of the WILCO project staff and the NCHEMS advisory staff was held on October 18, 1976. These discussions focused on Program Measures and Program Elements that might be incorporated into the Program Classification Structure standard scheme which would allow for the classification and organization of statistical data necessary for library decision-making. NCHEMS has developed standard schemes for classifying and organizing data for post secondary education decision-making at the local, state, and national levels. The present project will build on the established Libraries Subprogram of the Program Classification Structure incorporating elements already coded into the structure with new Program Elements to be added to the existing Program Subcategories as they are identified and defined. The development of the proposed library Statistical Data Base System within the NCHEMS system will greatly accelerate the first phase of the project. Building upon the NCHEMS structure, Program Elements can eventually be statistically combined to produce a variety of outputs relevant to library decision-making.

C. Major Research Universities Task Force

Over a five-year period NCHEMS has developed a set of Information Exchange Procedures (IEP) that generalize across institutions. However, it was felt that the problems of major research universities were unique and not adequately addressed. In response to these circumstances, an ad hoc committee of representatives from the major research universities convened to identify and discuss the specific problems of these universities. The result of the meeting was a project to develop a set of exchange procedures for major research university administrators to assist them in carrying out their "planning and management responsibilities." One of the pertinent problems identified by this task force was the need for a more intense concentration on the libraries of the major universities.

Through Dr. James Topping and his assistant Mr. Ed Myers, liaison has been established with the Major Universities Task Force. The tentative plan is to incorporate the Statistical Data Base project findings into the Major Universities Task Force testing activities. By implementing this procedure, the project staff expects to measure the reliability of the data base system and the applicability of Program Elements and Outcomes. It is expected that further refinement will be necessary after completion of this testing. The Major Research Universities Task Force hopes to test the Information Exchange Procedures package (including the library module) in 1977.

D. Bibliography

An extensive bibliography relating to the project has already been compiled and is included at the conclusion of this report. An ERIC literature search was conducted yielding 501 citations. Manual searches were made of the indices of those publications whose content was considered most pertinent to the project and of Library Literature. The two articles cited in the text of this report are included in the Preliminary Bibliography for the sake of convenience.

VI. PROBLEMS

Due to slight delays incurred by minor staff changes and in completion of the U. S. Office of Education Cost and Funding Project, the present project is late in getting started. This delay will be compensated for by employing a Research Assistant. In addition, a WICHE intern, Dr. Bernice McKibben, has contributed her services--making significant inroads into the developmental stages of the project. A Task Inventory, Schedule, and Calendar outlining in detail the time alloted for completion of each task to be executed during the remainder of the project are included in APPENDIX A.

The project staff is proposing the following project modification. Because of duplication in the collection of library statistics and growing resistance to completing survey instruments, no extended data collection activities will be attempted. Instead, the staff will rely on available data already collected by HEGIS, LIBGIS, and the current Cost and Funding Project for the Statistical Data Base System.

VII. SIGNIFICANT FINDINGS AND EVENTS

The project staff views the following three findings and events as significant: (1) The framework of the NCHEMS Program Elements; (2) our contact with Dr. Scott Bruntjen, at Shippensburg State College, Pennsylvania, who has agreed to provide a position paper documenting the usefulness of the Statistical Data Base System, and (3) the continued support and cooperation of the Library Task Force of the Council for Advancement of Small Colleges Research and Management Project directed by Mr. Willis M. Hubbard.

A. NCHEMS Program Classification Structure Framework

The first level of the Program Classification Structure is composed of eight divisions known as Programs (APPENDIX B, page 25)

1.0 INSTRUCTION
2.0 RESEARCH
3.0 PUBLIC SERVICE
4.0 ACADEMIC SUPPORT
5.0 STUDENT SERVICE
6.0 INSTITUTIONAL SUPPORT
7.0 INDEPENDENT OPERATIONS
8.0 SCHOLARSHIPS & FELLOWSHIPS[1]

B. Rationale of the Structure

"The Program Classification Structure is intended to provide a mechanism that will facilitate the organization of data and the use of various planning and management tools."[2] It serves as a program structure for planning and analysis.

The following paragraphs by Gulko outline the purpose and rationale of the structure.

> The NCHEMS participating institutions have recognized that a way must be found to improve planning and analysis by relating resource information to achievement of institutional objectives. Such information is necessary in order to evaluate the costs and benefits of alternative programs. In many cases, the evaluation of higher education expenditures and benefits will require a comparison of data from similar institutions. The Program Classification Structure has been developed to facilitate this comparison of information by providing a foundation for achieving comparability in the exchange of institutional data.[3]

> [A Program Classification System] that will help sort out and trace the utilization of all resources channeled into the institution will aid management in determining how available resources are utilized by the various activities. By relating expenditures to objectives, management will be better able to evaluate alternatives and consider decisions regarding the allocation of scarce resources.[4]

---

[1]Douglas J. Collier, Michael Hardesty and Clara M. Roberts, "Revision of the Program Classification Structure" Technical Report No. 71 (unpublished preliminary draft, Boulder, Colorado: NCHEMS, December 1975) first leaf, unpaged.

[2]Warren W. Gulko, Program Classification Structure, Technical Report No. 27 (Boulder, CO.: NCHEMS, January 1972), p. 13.

[3]Gulko, Ibid., p. 2. [4]Ibid., p. 3.

C. Program Structure Nomenclature

According to Gulko, there are three levels that traditionally describe program structures: (1) Program, (2) Subprogram, and (3) Program Element. The NCHEMS Program Classification Structure has been expanded into the following levels. (APPENDIX B, p.26)

1. PROGRAM
2. SUBPROGRAM
3. PROGRAM CATEGORY
4. PROGRAM SUBCATEGORY
5. PROGRAM SECTOR, and
6. PROGRAM ELEMENT

The following definitions are taken from Gulko's Program Classification Structure to describe most accurately the six program structures.

(1) The PROGRAM structures the Program Elements into major objectives. It is based on eight programs. (APPENDIX B, p. 25)

(2) The SUBPROGRAM is a subdivision of the Program. Its purpose is the collection of Program Elements into homogeneous sets related to the sub-objectives of the Program.

(3) The PROGRAM CATEGORY is a classification of similar or related Program Elements by discipline area or major function. The Program category permits the classification of Program Elements independent of the Program or Subprogram structure and may be used to aggregate functionally related Program Elements across Program lines.

(4) The PROGRAM SUBCATEGORY is a refinement of the Program category and represents the principal aggregation level for collecting Program Elements organized to achieve or contribute to a specific set of outputs related to the Program objective. Program Elements that are substitutes (i.e., produce similar outputs) should be organized within the same Program Subcategory.

(5) The PROGRAM SECTOR refers to a subset of Program Elements within a Program Subcategory. It is designed primarily to identify the level of course for instruction Program Elements, e.g., lower division.

(6) The PROGRAM ELEMENT refers to the lowest level of aggregation, a collection of resources, technologies, and policies integrated through a set of activities to contribute directly to the Program objective in a measurable fashion. It is normally a distinct entity, separately managed or controlled, and represents the basic unit of the Program Classification Structure.

APPENDIX B provides examples of the type of operations, functions, and programs under each level of the structure.

D. Program Measures

Associated with each Program Element are Program Measures. The pamphlet NCHEMS Products; Publications, Software, Videocassettes, November 1, 1976, describes Program Measures thusly:

> Program Measures--identifies, describes, and categorizes quantitive indicators into six Program Measures groups that provide information about each Program Classification Structure Program Element as follows:
>
> 1. RESOURCE MEASURES provide data on the personnel involved, the facilities and equipment used, and the supplies and services consumed.
>
> 2. FINANCIAL MEASURES indicate the funds obtained from various sources; the capital investment expenditures incurred for land, buildings, and equipment; and the operating expenditures spent for personnel, supplies, and services.
>
> 3. BENEFICIARY GROUP MEASURES describe the groups of people who benefited.
>
> 4. TARGET GROUP MEASURES identify the people, places, or things toward whom or at which the activities of the Program Element were directed.

5. ACTIVITY MEASURES describe the types and levels of activities conducted.

6. OUTCOME MEASURES indicate the outcomes or products generated as a result of the activities of the Program Element.

A sample, preliminary matrix with Program Measures and Program Classification Structure categories to be employed in the Statistical Data Base System project are included in APPENDIX B, p. 27.

The Statistical Data Base project staff will function within the framework just described under the PROGRAM Academic Support (4.0) and the SUBPROGRAM Libraries (4.1). Since the Program Sector level is designed to identify the level of instructional course, that level will not concern the project staff during the first phase of this project. (APPENDIX B, p. 28)

E. Shippensburg State College. Pennsylvania Higher Education System.

It was our good fortune to develop an association with Dr. Scott Bruntjen, Shippensburg State College, Pennsylvania. Dr. Bruntjen contends that current academic library statistics do not clearly reflect output measures. Originally, Dr. Bruntjen and his staff had planned a project to devise new outcome measures. However, when the WILCO Statistical Data Base project was brought to his attention, the obvious similarity between the two projects was noted.

A cooperative venture is now underway for Shippensburg State and 13 associated teachers colleges in Pennsylvania's Higher Education System to solicit funding through the Pennsylvania State Library to test our data collection mechanisms and to evaluate the outcome measures. They will then provide WILCO with a position paper documenting whether or not they were able to generate useful outcomes. The Pennsylvania group is also interested in interrelating broader institutional data with library measures. The NCHEMS Program Classification Structure provides for this contingency.

F. CASC Research and Management Project Task Force

The Council for the Advancement of Small Colleges (CASC) has been awarded a grant to finance the first phase of a series of studies on four hundred small, private liberal arts colleges in the United States. The Research and Management Project Task Force Chairman, Willis M. Hubbard, has demonstrated his intention to cooperate with the

Statistical Data Base project staff. The Library Task Force of CASC is collecting data from these small college libraries for the purpose of obtaining median distributions of library budgets among salaries and wages, library materials, and an "all other" category. Once collected, this data can be used to gain a picture of productivity (output) in terms of resources consumed (input).

VIII. DISSEMINATION ACTIVITIES

This First Quarterly Report will be sent to more than 100 persons. The grant award was announced in WILCO Newsletter, No. 4, July 1976. This announcement generated interest in the project among librarians and other interested persons throughout the West. News on the progress of the Statistical Data Base System project will continue to be printed in the WILCO Newsletter. APPENDIX D contains WILCO Newsletter, No. 4, in which the grant was announced, and a copy of the most recent issue.

IX. STAFF UTILIZATION

Few staff changes have taken place since the original proposal was submitted. Eleanor Montague has assumed Maryann Duggan's position as Principal Investigator, Mary Haenselman has taken over the secretarial position previously held by Louise Martin, and a Research Assistant is now being selected to assist in the completion of the project.

X. ACTIVITIES PLANNED FOR NEXT REPORTING PERIOD

As can be seen from APPENDIX A, the Task Inventory and Time Schedule for the next reporting period call for the following specific tasks to be accomplished:

- complete bibliography
- complete data element description form
- produce preliminary compilation of existing data elements
- produce preliminary compilation of new data elements
- identify and fill-in gaps in Program Classification Structure categories
- update the composite Dictionary of Data Elements and Standard Definitions of Terms

- produce a preliminary working model of NCHEMS Libraries Subprogram
- meet with William Rouse and Willis Hubbard
- meet with the national advisory board
- produce the Second Quarterly Report

XI. FINANCIAL REPORT

Due to the delay in initiating this project, this quarterly report is not protypical. Expenditures did not occur in all categories as would have been the case had not the project been delayed in getting started. These savings will be utilized for a no cost extension beyond the termination date of June 30, 1977, if such an extension is required to complete the project. The financial report for the period July 1, 1976, to October 31, 1976, appears in APPENDIX C.

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APPENDIX A

TASK ANALYSIS AND INVENTORY

On the following pages are listed the major tasks to be performed by the WILCO project staff in the Development and Demonstration of A Statistical Data Base System for Libraries and Network Planning and Evaluation for the U. S. Office of Education. Tasks resulting in products are identified by an astrisk (*) on the Schedule page (20). Projected meetings are included on the Calendar pages 21, 22, 23 and on the Schedule page. Travel schedules are not included.

TASK 1. Complete bibliography. Read and annotate.
Performance estimate: 4 weeks
Staff: RESEARCH ASSISTANT

TASK 2. Design data element description form.
Performance estimate: 2 weeks
Staff: BROWN

TASK 3. Identify and compile existing data elements.
Performance estimate: 7 weeks
Staff: McHUGH, RESEARCH ASSISTANT (compilation)
BROWN, McHUGH, RESEARCH ASSISTANT (identification)

TASK 4. Preliminary identification of current outcome measures.
Performance estimate: 8 weeks
Staff: BROWN, McHUGH

TASK 5. Preliminary identification of new data elements.
Performance estimate: 8 weeks
Staff: BROWN, McHUGH, RESEARCH ASSISTANT

TASK 6. Preliminary development of standard definitions of terms.
Performance estimate: 8 weeks
Staff: RESEARCH ASSISTANT

TASK 7. Preliminary Composite Dictionary of Data Elements and Standard Definitions of Terms.
Performance estimate: 9 weeks
Staff: ALL

TASK 8. Preliminary working model of NCHEMS Libraries Subprogram.
Performance estimate: 9 weeks
Staff: McHUGH, MYERS, NCHEMS PROGRAMMING STAFF

TASK 9. Second Quarterly Report.
Performance estimate: 2 weeks
Staff: BROWN

TASK 10. Complete identification of existing data elements.
Performance estimate: 6 weeks
Staff: BROWN, McHUGH, RESEARCH ASSISTANT (identification)
McHUGH (compilation)

TASK 11. Identify and fill in gaps in data element structure.
Performance estimate: 8 weeks
Staff: RESEARCH ASSISTANT

TASK 12. Update dictionary.
Performance estimate: 8 weeks
Staff: RESEARCH ASSISTANT

TASK 13. Review existing NCHEMS computer programs.
Performance estimate: 7 weeks
Staff: McHUGH, NCHEMS PROGRAMMING STAFF

TASK 14. Final refinement of dictionary and outcome measures.
Performance estimate: 3 weeks
Staff: BROWN, McHUGH, RESEARCH ASSISTANT

TASK 15. Final development of NCHEMS Libraries Subprogram model.
Performance estimate: 3 weeks
Staff: BROWN, McHUGH, RESEARCH ASSISTANT

TASK 16. Third Quarterly Report.
Performance estimate: 2 weeks
Staff: BROWN

TASK 17. Testing.
Performance estimate: 2 weeks
Staff: BROWN

TASK 18. Final revision.
Performance estimate: 2 weeks
Staff: BROWN, McHUGH, RESEARCH ASSISTANT

TASK 19. Final report.
Performance estimate: 3 weeks
Staff: BROWN, McHUGH

SCHEDULE

PRODUCTS AND DUE DATES

*Deliverable Products:

TASK NO.	DUE DATE	TITLE
--	11/8/76	*First Quarterly Report
1	11/30/76	*Complete Bibliography
2	11/19/76	Data Element Description Form
3	12/17/76	Preliminary Compilation of Existing Data Elements
4	12/30/76	Preliminary Compilation of Current Outcome Measures
5	12/30/76	Preliminary Compilation of New Data Elements
7	1/14/77	*Preliminary Composite Dictionary of Data Elements and Standard Definitions of Terms
8	1/7/77	*Charted Preliminary Working Model of NCHEMS Libraries Subprogram
	1/17/77	Meeting of the National Advisory Board
9	1/31/77	*Second Quarterly Report
14	4/15/77	*Final Dictionary of Data Elements and Standard Definitions of Terms
14	4/15/77	*Final Compilation of Outcome Measures
15	4/15/77	*Final NCHEMS Libraries Subprogram Model
	4/18/77	National Advisory Board Meeting
16	4/29/77	*Third Quarterly Report
17	5/31/77	*Compilation of Test Results
19	6/30/77	*Final Report
	6/30/77+	*Dissemination of Results

PHASE I

NOVEMBER 1976

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28	29	30				

DECEMBER 1976

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26	27	28	29	30	X	

JANUARY 1977

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WEEKS 1 - 4 November				WEEKS 1 - 4 December			20-22	WEEKS 1 - 4 January			+31
1-5	8-12	15-19	22-24	N20-D3	6-10	13-17	27-30	3-7	10-14	17-21	24-28
			Data element description form.								
Complete bibliography.							Adopt a conceptual framework for the Libraries Subprogram of NCHEMS PCS which will permit analysis by library function, available resources, patron groups, etc.				
Identify and compile existing data elements.											
Preliminary identification of current outcome measures.											
Preliminary identification of new data elements.											
Compile composite dictionary of data elements now being used.											
		Review dictionary and develop standard definitions of terms.									
Develop preliminary working model of NCHEMS Libraries Subprogram.										▲ NAB Meeting	
Meet with NCHEMS staff as required.							Second Quarterly Report.		Revision phase.		

▲ National Advisory Board

PHASE I

1977 FEBRUARY 1977

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1977 MARCH 1977

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1977 APRIL 1977

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WEEKS 1 - 4 February 1-4	7-11	14-18	+28 21-25	WEEKS 1 - 4 March 1-4	7-11	14-18	28-31 21-25	WEEKS 1 - 4 April 4-8	11-15	18-22	25-29
Complete identification of existing data elements.											
Update dictionary--ongoing.											
Identify and fill in gaps in data element structure--ongoing.											
Review existing computer programs (NCHEMS).							Final refinement of dictionary and outcome measures.				
							Final development of NCHEMS Libraries Subprogram model.			▲ NAB MEETING	
									Revision phase.		
							Third Quarterly Report.				
Meeting with NCHEMS staff as required.											

▲ National Advisory Board

PHASE I

1977 MAY 1977

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1977 JUNE 1977

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26	27	28	29	30		

WEEKS 1 - 4 May				WEEKS 1 - 4 June						
2-6	9-13	16-20	23-27	30-31	1-3	6-10	13-17	20-24	27-30	
Testing										
		Revision								
					▲National Advisory Board Meeting					
					Final Revision					
						Final Report				
						Dissemination of results.				

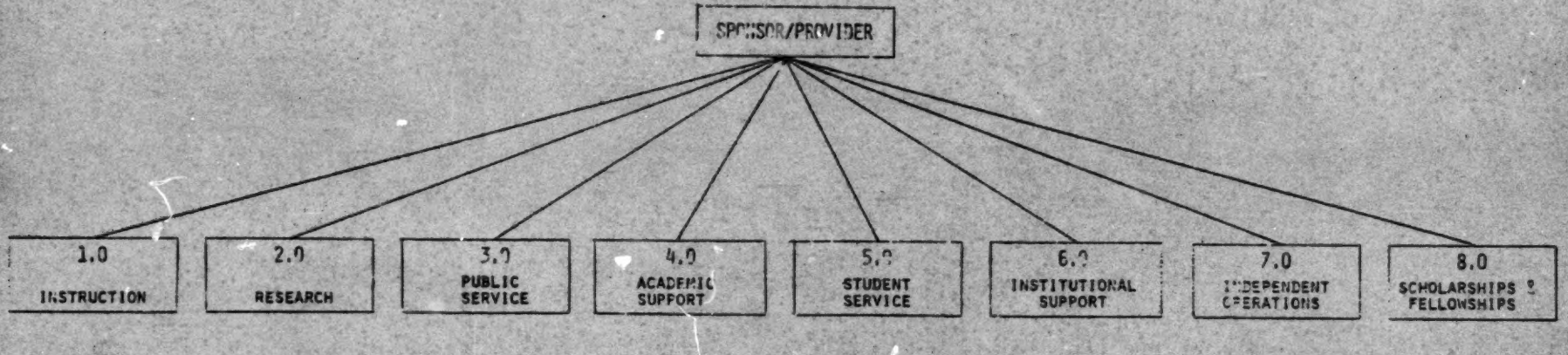
31

32

APPENDIX B

REVISED

PROGRAM CLASSIFICATION STRUCTURE



1.1 General Studies Instruction-For Credit
1.2 Occupational and Career Instruction-For Credit
1.3 Public Affairs/ Citizenship Instruction-For Credit
1.4 Personal Development Instruction-For Credit
1.5 General Studies Instruction-Not For Credit
1.6 Occupational and Career Instruction-Not-For-Credit
1.7 Public Affairs/ Citizenship Instruction-Not-For-Credit
1.8 Personal Development Instruction-Not-For-Credit
1.9 Requisite Preparatory/Remedial Instruction

2.1 Institutes and Research Centers
2.2 Individual or Project Research

3.1 Direct Patient Care
3.2 Health Care Support Services
3.3 Community Services
3.4 Cooperative Extension Services
3.5 Public Broadcasting Services

4.1 Libraries
4.2 Museums and Galleries
4.3 Educational Media Services
4.4 Computing Support
4.5 Ancillary Support
4.6 Academic Administration
4.7 Course and Curriculum Development
4.8 Academic Personnel Development

5.1 Student Service Administration
5.2 Social and Cultural Development
5.3 Counseling and Career Guidance
5.4 Financial Aid Administration
5.5 Student Auxiliary Services
5.6 Intercollegiate Athletics

6.1 Executive Management
6.2 Financial Management & Operations
6.3 General Administrative Services
6.4 Logistical Related Services
6.5 Physical Plant Operations
6.6 Faculty & Staff Auxiliary Services
6.7 Public Relations and Development
6.8 Student Recruitment, Admissions & Records

7.1 Independent Operations/ Institutional
7.2 Independent Operations/ Outside Agencies

8.1 Scholarships
8.2 Fellowships

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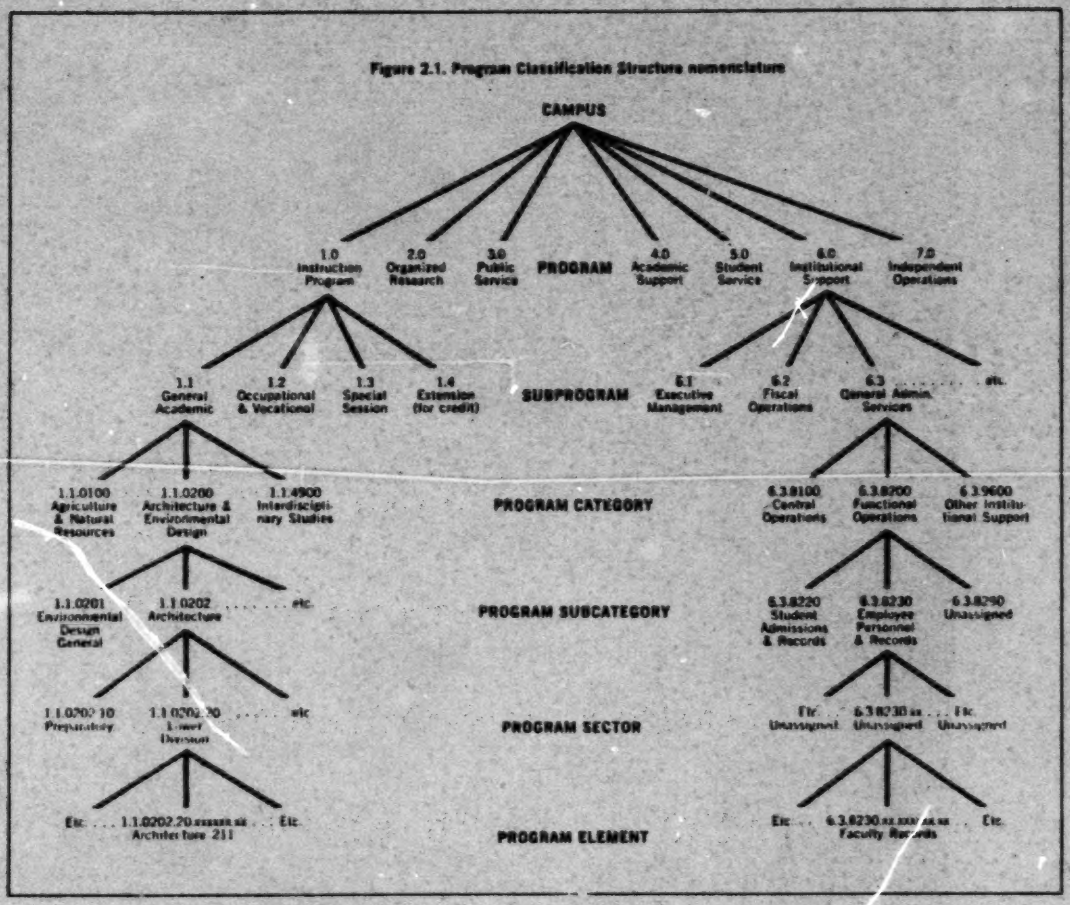
Program Classification Structure Nomenclature



NCHEMS
Program Classification Structure
Technical Report 27, p. 21.

APPENDIX C

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SUMMARY BUDGET AND EXPENDITURES FOR JULY 1, 1976 THROUGH OCTOBER 31, 1976

ITEM	ALLOCATION	JULY	AUGUST	SEPT.	OCTOBER	TOTAL EXPENDITURES	BALANCE	
01 Salaries-Exmt	26,627	0	0	648.36	1545.30	2193.66	24,433.34	
02 Salaries-Nexmt	2,149	0	0	111.60	215.76	327.36	1,821.64	
04 Contract Hrly	--	0	0	0	0	0	0	
06 Benefits Exmt	3,737	0	0	63.26	70.39	133.65	3,603.35	
16 Benef.Non-Ex	301	0	0	113.99	264.29	378.28	(77.28)	
26 Intern Stip.	--	0	0	0	0	0	0	
* 27 Conslt.Fee	2,700	0	0	0	0	0	2,700.00	
28 Subcontracts	--	0	0	0	0	0	0	
29 Data Process.	2,675	0	0	0	0	0	2,675.00	
30 Travel-Staff	2,400	0	0	0	0	0	2,400.00	
31 Travel-Reloc.	--	0	0	0	0	0	0	
32 Travel-Consul.	5,760	0	0	0	0	0	5,760.00	
* 33 Travel-Other	2,160	0	0	0	0	0	2,160.00	
34 Travel-Trainee	--	0	0	0	0	0	0	
45 Publications	--	0	0	0	0	0	0	
53 Office Rent	--	0	0	0	0	0	0	
54 Phone Base	410	0	0	0	0	0	410.00	
55 Phone Toll	1,000	0	0	0	0	0	1,000.00	
58 Postage	--	0	0	0	0	0	0	
60 Meet. Exp.	--	0	0	0	0	0	0	
61 Office Supp.	--	0	0	0	0	0	0	
64 Copying	--	0	0	0	0	0	0	
65 Other Exp.	--	0	0	0	0	0	0	
66 Train. Mats.	--	0	0	0	0	0	0	
77 Equip. Rental	--	0	0	0	0	0	0	
TOTAL DIRECT COST	49,919	0	0	937.21	2095.74	3032.95	46,886.05	
99 Indirect Cost	9,081	0	0	0	0	0	9,081.00	
GRAND TOTAL	59,000	0	0	937.21	2095.74	3032.95	55,967.05	

+Honorarium Fee *Evaluator's Travel

APPENDIX D

WILCO NEWSLETTER

Western Interstate Library Coordinating Organization

July 1976 No. 4 ISSN: 0361-9478

WILCO AWARDED USOE GRANT TO DEVELOP AND DEMONSTRATE A STATISTICAL DATA BASE SISTEM FOR LIBRARY AND NETWORK PLANNING AND EVALUATION

WILCO has been awarded $59,000 from the U.S. Office of Education to develop a statistical data base system for library and network planning and evaluation. In addition the project will be supported by $17,728 in matching funds from WILCO member states. The statistical data base system will present a means of gathering, organizing and disseminating the kinds of data needed for resource allocation decisions within a library or a network of libraries. The system is intended as a basis for modeling alternative outcomes from various resource allocation decisions, the impact of changes in resources on library services, etc., and for other types of manipulations necessary for decision-making.

The system will be based on the data file structure and software developed by the National Center for Higher Education Management Systems (NCHEMS) which are used in over 800 post-secondary educational institutions. The system will be designed, demonstrated and evaluated in the West, but will be of value to the entire library community. A national advisory board composed of representatives from national organizations concerned with library statistics will insure technical quality and compatability with on-going data gathering activities (such as HEGIS and LIBGIS).

The activities and products of the project are aimed at making a maximum impact nationally on the collection, processing, and use of library statistics in decision-making for library services.

The results of the work will be a working system for using library statistics, with standardized cost data elements and definitions. User manuals and other tools for operating the system will be published, together with the findings of the study. During the grant period, the system will be demonstrated at different levels of the library community.

ACCESS TAPES AVAILABLE THROUGH WILCO CONTINUING EDUCATION PROGRAM

WILCO has purchased a complete set of the ACCESS tapes (16 video tapes and 20 Study Guides). The whole set or individual tapes may be borrowed from WILCO by member states. The borrowed tapes should not be used for reproduction. However, a WILCO member state can purchase the set or individual tapes through WILCO at a 20% discount. For more information, please write or call WILCO, P. O. Drawer P, Boulder, Colorado 80302, (303) 492-7317.

NEW TELEPHONE NUMBER

As of July 19, all WILCO staff members can be reached at a new telephone number: (303) 492-7317. For those libraries participating in the Cost and Funding Studies, Maryann Kevin Brown or Anita McHugh can also be reached at (303) 492-8188.

Western Interstate Commission for Higher Education P.O. Drawer P, Boulder, Colorado 80302, (303) 492-7317

Edited by Eleanor A. Montague

WILCO CE (CONTINUING EDUCATION) PROGRAM

In addition to resource sharing/networking coordination and library and information science research, a primary WILCO program area is continuing education.

The goals of the WILCO CE program are to:

1) Coordinate CE resources and activities in the West;
2) Assist in the development of need and problem statements at the local, state and regional level;
3) Participate in CE planning and coordination at the regional level with the regional library associations, library schools, etc., and at the national level with CLENE and NCLIS;
4) Provide, in cooperation with CLENE, a clearinghouse (WESTEX - Western Continuing Education Exchange) to coordinate and exchange information on existing CE resources (materials and personnel) in order to:
    - maximize use of existing resources,
    - reduce redundant development,
    - identify areas for new development to meet specialized or common needs;
5) Facilitate access to and delivery of CE materials, services, programs, etc.;
6) Assist in evaluating CE programs, materials, etc. and in making this information available throughout the West;
7) Sponsor or co-sponsor programs, seminars, etc. of interest in the West and undertake or coordinate the development of materials to meet specialized or common needs or problems;
8) Foster the use of a reward system, such as CEUs (Continuing Education Unit), consistent with national plans.

The task at hand is to translate these goals into positive action and more effective and efficient use of CE resources to meet needs in the West.

Several projects are underway:

1) ACCESS tapes are available to member states for borrowing or purchase through WILCO (see separate article in this issue of the WILCO Newsletter).
2) Planning is in process for region-wide seminars in areas of common interest. WILCO will shortly announce the details of a series of "Preservation of Library Materials" seminars. Other seminars addressing areas of common interest or problems will be discussed and planned for the future.
3) WILCO is now an organizational member of CLENE and will work closely with the national organization.
4) WILCO has actively begun to gather information on CE programs, materials, etc. in the West. This is intended as complementary to CLENE's program of information acquisition and coordination. As appropriate, information on western CE resources will be reported to CLENE.

The WILCO CE program is dynamic, as it should be to best serve the CE needs of the West. We welcome your comments, inquirires, ideas -- whatever. Please contact Eleanor Montague at WILCO.

STAFF DEVELOPMENT INSTITUTE - Model Book and Final Report

The WICHE/USOE Institute for Training in Staff Development has just completed its year-long program intended to initiate and strengthen staff development capabilities in libraries, systems and agencies in the West. Forty-one librarians from 13 states participated in the Institute. An immediate outcome from the program is expected to be increased staff development efforts in each participant's organization. In the long run, WILCO looks to extending this kind of effort beyond the participants, through dissemination of the models they have developed and by working with each state as it plans for staff development needs.

A major outcome of the Institute is the publication entitled "Staff Development Model Book: Program Designs for Library Personnel" which contains the models developed by Institute participants for use in their home organizations. These models contain a wide variety of approaches which can be reviewed and considered by others interested in staff development. Each model has a brief critique.

The final report of this Institute includes not only narrative and evaluative descriptions of the Institute itself, but also contains, as Appendix C, the Model Book. The final report is being distributed to the joint funding sources -- U.S. Office of Education and members of the WILCO Western Council -- as well as to the Institute participants, their administrators, and others directly involved in the Institute. The Model Book is also available as a separate publication. (See "Publications Available" section of this issue of the WILCO Newsletter for more information.)

COOPERATIVE NETWORK PLANNING MEETING

As noted in the previous issue of the Newsletter, planning meetings were held in Palo Alto, California, on June 2-4. The purposes of the meetings were threefold: to review and revise the draft document entitled "Library Networking in the West: The Next Three Years;" to discuss specific future network cooperative activities; and to receive input on project status and future plans from the Steering Committee Executive Board. Participating in the meetings were:

H. Vince Anderson, South Dakota (Executive Board)
Lura Currier, Pacific Northwest Bibliographic Center
Hank Epstein, BALLOTS Center
Gerald Newton, California State Library
Mary Jane Reed, Washington Library Network
Gerald A. Rudolph, University of Nebraska (Executive Board)
H. Paul Schrank, Ohio College Library Center
Donald Simpson, Bibliographical Center for Research
Roderick Swartz, Washington (Executive Board)
Earle Thompson, Pacific Northwest Bibliographic Center (PNBC Brd. Chairman)
David Weber, Stanford University (Executive Board)

Eleanor Montague, WILCO
Karl M. Pearson, Jr. WILCO

The document "Library Networking in the West: The Next Three Years," as revised during the three-day meeting, plus proposal plans for future cooperative activities, will be discussed by the Steering Committee on July 17 in Chicago, and by a meeting of western bibliographic system, center and network directors, also in Chicago.

STEERING COMMITTEE MEETING

The final meeting of the Steering Committee for the grant entitled "Initiating the Design and Development of a Western Interstate Bibliographic Network" (CLR 614) will be held on July 17 in the Wabash Parlor of the Palmer House in Chicago. The Steering Committee will be discussing general project status, WILCO status, the USOE Cost and Funding Studies, the draft planning document entitled "Library Networking in the West: The Next Three Years," and potential future cooperative activities. Invited to join the Steering Committee are the WILCO Western Council of State Librarians, other western state librarians, western ARL directors, and representatives from bibliographic centers, networks and systems.

PUBLICATIONS AVAILABLE

The following WILCO publications are available at cost from the WICHE Publications Unit, P. O. Drawer P, Boulder, Colorado 80302. Please include payment with your order.

- Staff Development Model Book: Program Designs for Library Personnel (Catalog #2B122). June 1976, 131 p. $2.50
- Final Report of the WICHE/USOE Institute for Training in Staff Development, June 1975 - June 1976 (Catalog #2B123). 235 p. $5.00
- WILCO Technical Processing and Interlibrary Loan Cost Data Collection Instruments (Catalog #2B124). June 1976 $5.00

NOTE: The WILCO Users Manual for Cost Data Collection in Technical Processing and Interlibrary Loan describing the computer programs used to manipulate, summarize and format the cost data for output will be available for sale by the end of August.

WICHE HAS A NEW EXECUTIVE DIRECTOR

Dr. Phillip Sirotkin, formerly Executive Vice President, State University of New York at Albany, has replaced Dr. Robert Kroepsch as WICHE Executive Director. Although Dr. Sirotkin comes from New York, he is quite familiar with WICHE. In fact, he is a former WICHE staffer. He served in the late 1950's under Dr. Harold Enarson and was a major force in the creation of the Mental Health Council.

WILCO
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Western Interstate Library Coordinating Organization

WILCO newsletter

September 1976 No. 5 ISSN: 0361-9478

NETWORK PLANNING DOCUMENT AVAILABLE

WILCO is making available for general distribution and comment the fifth draft of Library Networking in the West: The Next Three Years. The document, originally prepared by WILCO staff, has been extensively reviewed and revised by representatives from bibliographic utilities, service centers, state library agencies, academic and public libraries and others in the library and information science profession.

The document discusses goals for networking in the West (in the context of national library network planning) that can guide resource-sharing activities during the next three years, including a strategy, tasks and responsibilities for each. The document is not a task list for WILCO or any single organization. It is a guide to which western librarians can contribute and commit as we all move forward in making cooperation more effective in the West and the country. Over the next several months, work can be started on each task. If you would like a copy (at no charge) contact: Mary Haenselman, Project Secretary, WILCO, PO Drawer P, Boulder, CO 80302, (303) 492-7317.

This network-planning document must be dynamic in order to continually take into account national network planning, technological advancements and comments from librarians and information scientists. WILCO welcomes your comments and reactions and will issue new drafts as required. Please send your comments to Eleanor Montague or Karl Pearson at the above address.

MEETING AT LC

On August 9, 1976, the Library of Congress and the Council of Library Resources hosted the second meeting of network representatives to discuss National Library Network planning and the role of the Library of Congress. Henriette Avram chaired the meeting, called to gather comments on the next steps in network design and to discuss activities and projects that are already underway at the Library of Congress, the National Commission, the Federal Library Committee and in the West.

The group agreed to meet again on December 2 and 3, 1976, at the Library of Congress, to discuss a draft paper on the objectives, functions, and policy and technical considerations for the National Library Network. Mrs. Avram appointed a four-man task force to draft this discussion paper. Task force members are Larry Livingston (Chairman), Eleanor Montague, Roderick Swartz, and James Govan.

MORE INFORMATION ON ACCESS

WILCO, as part of its continuing education program (see article on WESTEX in this Newsletter) occasionally purchases expensive continuing education programs and makes them available for borrowing. As we announced in the last Newsletter, WILCO has purchased a set of ACCESS tapes. The following description, abstracted from the ACCESS Study Guide, should give you a better idea of the scope and purpose of ACCESS.

There are sixteen videotapes in the ACCESS series, designed to share some of the procedures, ideas and common problems that librarians working in small towns face. Designed as continuing education for staffs of public libraries in rural communities of the Rocky Mountain states, the ACCESS series attempts to better equalize library service to citizens of the Rocky Mountain region by upgrading the skills and reducing the professional isolation of librarians in small communities. The ACCESS series is not designed to be viewed in any particular sequence, nor is it designed as part of any existing library education curriculum. Each tape stands alone as a treatment of one library issue or topic.

Twenty-Minute Documentary Tapes

Community Resource Files
Determining the Library User's Need
Oral History (what is involved in undertaking an oral history project)
Preschool Story Programs
Public Relations
Publicity
Science Questions Sometimes are Issue Questions
Services for the Blind and Physically Handicapped
Services to Elementary-Age Children
State Libraries: Materials, Manpower, Money
Vertical File
Volunteers in the Library

Forty-Minute Panel Discussion

Assessing Community Needs
Censorship
School Library/Public Library Cooperation
Where the Library Dollars Are (ways a small library can supplement its regular operating budget)

Any library in a WILCO member state may borrow ACCESS tapes free of charge. Libraries in non-member states may borrow tapes, as available, for $10.00 per tape per use. According to our arrangements with the ACCESS producers, users may not duplicate these tapes. However, WILCO can obtain a discount on the individual tape price of $260 or the series price of $3,800.

For more information, or to borrow a tape, contact Mary Haenselman at the WILCO office.

WESTERN COUNCIL MEETING

The WILCO Western Council will hold its fall meeting on October 25 and 26, 1976, at the Portland, Oregon Sheraton (Airport). The Council will discuss networking activities, WESTEX, new services and plans for future activities, and new grant proposals.

WICHE INTERNS

WILCO is fortunate to have three WICHE interns working on special projects: Scott Gassler, Bernice McKibben, and Phillip Rose. The intern program is run by the Resources Development Intern Program (RDIP) at WICHE. Based on the profile supplied by the employer, RDIP locates candidates for the 12-week internship. The cost to the employer is $1800.

If your library or organization has special projects that could be undertaken by a WICHE intern, we urge you to contact Robert Hullinghorst, Director, Resources Development Intern Program, WICHE, PO Drawer P, Boulder, CO 80302. Scott Gassler is doing research on the "Economics of Library Networks," Phillip Rose's project is "Resources for Correctional Institutions," and Bernice McKibben is preparing a paper on "Satellite Telecast of Continuing Education for Librarians." In addition, other WICHE interns have worked with libraries to develop special services to industry, to plan a mobile community service, to evaluate a telefacimile system, and to prepare a local historical survey.

WILCO LAUNCHES WESTEX

What is WESTEX?

WESTEX is the Western Continuing Education (CE) Information Exchange and Network coordinated by WILCO (Western Interstate Library Coordinating Organization). The purpose of WESTEX is to provide a centralized place in the West where continuing education planners can come when they need assistance to (a) locate current and complete information on continuing education resources (courses, programs, seminars, etc. and personnel), (b) evaluate the effectiveness and impact of continuing education resources, and (c) utilize existing resources or develop new ones.

By sharing information on programs and their impact on those who have experienced them, our goal is to reduce redundant or irrelevant development and improve the quality of continuing education. By having a continuing staff resource at WESTEX, our goal is to save time for those responsible for continuing education programs at the state, local or regional level in any type of library, media, or information center.

WESTEX Services and Products

WESTEX provides a variety of services and products:

1. A calendar of upcoming events. The purpose of the calendar is to make sure that people are aware of programs that may interest them. Events will be reported in the WILCO Newsletter. On demand inquiries will be answered by telephone or by mail.

2. Assistance in locating specific CE resources. WESTEX will search available files to locate programs or people that meet specified needs.

3. Impact and evaluation reports. Upon request, WESTEX will contact previous users of CE programs and prepare a summary evaluation based on those contacts. This service provides information to CE planners to help them decide whether they can use an already developed program.

4. Delivery of CE programs. Upon request, WESTEX will (a) help facilitate the transfer of existing CE programs; (b) on a contract basis, develop or subcontract for development, CE programs to meet specific needs; and (c) purchase expensive CE packages of general interest and make these available to member states.

5. CE programs of general interest. WESTEX will sponsor workshops, seminars, and so on, on subjects of general interest, on a cost recovery basis. The recent "Conservation of Library Materials" seminars exemplify this service. WILCO welcomes ideas, comments, and suggestions.

WESTEX maintains or has access to current files on:

- upcoming CE events (a calendar of one-time or regularly scheduled programs, etc.)
- CE offerings (programs, workshops, seminars, self-instruction aids, courses and so on for library, information and media personnel. The emphasis is on programs that can be transferred or run several times.)
- CE experts and resource people.

WESTEX Relationship to CLENE

CLENE is the Continuing Library Education Network and Exchange, a national organization with headquarters at Catholic University, Washington, D.C. WESTEX is a regional coordinating organization designed to funnel information from the West into CLENE and to provide a continuing staff resource and information center for CE planners in the West. WESTEX does not intend to duplicate data or services of CLENE.

How to Get Services and Products from WESTEX

Any CE planner in a WILCO member state may request information, services and products by writing or phoning:

WILCO
P.O. Drawer P
Boulder, CO 80302

Telephone: (303) 492-7317
492-8188

If a search of the CLENE data base is authorized, WESTEX will bill the requester at the CLENE search rate (to be announced shortly).

How to Get Information Into WESTEX (and CLENE)

The effectiveness of WESTEX (and CLENE) depends on up-to-date information on continuing education courses and programs for library, information and media specialists and lay leaders. To standardize this reporting system and reduce redundant reporting, WESTEX encourages the use of the data collection forms for programs and personnel developed by CLENE. Copies are available from WESTEX. WESTEX will forward all data to CLENE for addition to the CLENE files on programs and resource people.

For More Information on WESTEX

If you want more information, or if you have comments on WESTEX, please contact Eleanor A. Montague, Director, WILCO, Western Interstate Commission on Higher Education, P.O. Drawer P, Boulder, CO 80302, (303) 492-7317 or 492-8188.

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